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Memorandum

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From: Howard Weitzner, Accenture

Date: September 30, 2001

Subject: Deliverable 29.3.1c Training Services Summary

Purpose
This memo summarizes the results of Training Services provided to SFA University during the period August 16 – September 30, 2001. The results were delivered through supporting materials and working sessions with SFA University staff. The work effort addressed improvements to SFA University's training services, processes and systems.

Initiatives this Period
Specific initiatives addressed during this period included:
- SFA University planning meeting design and support
- SFA University strategic planning and organization development
- Training development and delivery methodology/process team support
- Project management support
- LMS support

Planned Initiatives
During the period October 1 – October 30, the following initiatives may be addressed, but not limited to:
- SFA University planning meeting design and support
- SFA University strategic planning and organization development
- Training development and delivery methodology/process team support
- Development of the Learning Consultant role and capabilities
- Manager development and performance support assistance
- Project management support
- Delivery cost assessment
- LMS support

Subject: Deliverable 29.3.1c Training Services Summary; September 30, 2001

Description of Initiatives

SFA University planning meeting design and support

A series of SFA University planning meetings have been planned and/or conducted for all SFA managers.   The purpose of these meetings is to review the current SFA University organization, plan future activities for the organization and identify the approach for achieving SFA University's performance plan. Specific activities include meeting with attendees to identify the scope of the meeting, agenda planning, development of activities, facilitation of the meetings and directing follow-up activities. Specific services and priorities discussed include:

* Identification of strategic services
* Review SFA University vision and mission
* Develop the Balanced Scorecard for SFA University
* Clarify and reduce the list of brainstormed activities and present back to the team
* Further define the "learning circle" operational model
* Clarify and confirm the SFA University shared vision

Training development and delivery methodology/Process team support

The process team has evolved from a team designed to improve the process of APS Processing with the Schools channel to a team designed to create and implement a best practice for how SFA University develops and delivers training. This training development and delivery methodology will enable SFA University to provide "best-of-breed" training services to the organization.

The methodology (Plan It, Design It, Build It, Do It, Assess It) follows a customized version of the ADDIE model (Analysis, Design, Develop, Implement, Evaluate). Major tasks, deliverables and roles have been identified and were presented to the "stakeholder" group. Currently, the team is using the materials as a basis for supporting joint training efforts with the Schools channel. Specific activities during this past work period included:

* Refinement of the "Gantt" chart detailing the timing and coordination of tasks
* Development of templates, job aids and deliverables for the Plan It! and Design It! phases
* Planning of the pilot phase of work
* Development of training materials for introducing the process to the training teams

Subject: Deliverable 29.3.1c Training Services Summary; September 30, 2001

The next phases of work will include:
- Working sessions with the Schools Channel to define the scope and approach for the training teams
- Development of team lead training to develop the skills required to be a project lead for a training development effort; including an overview of the process and detailed use of the templates, job aids and deliverables
- Facilitation of team lead training and on-going support of the training teams
- Completion of the Plan It! and Design It! phase deliverables; Development of the Build It! and Assess It! phase deliverables

SFA University strategic planning and organization development
Working sessions with senior members of the SFA University staff to review SFA University's strategic direction and chart the path for SFA University to become a full strategic partner within SFA. These working sessions focus on the prioritization of SFA University services, capability development, marketing SFA University and contingency planning. Outcomes from this effort include identification of innovations and processes, which support SFA University's growth and organization development.

Project Management Support
Project management support continues to be provided to assist SFA University formalize the role of its project managers. This information identifies the role, tasks and tools an SFA University project manager will leverage to be successful. Recent deliverables include project and program level reporting procedures and templates for use by SFA University's External Partner Services.

Delivery cost assessment
An initial analysis of course information from SFA University's 1999 Annual Report on Training has identified opportunities to reduce the costs of delivering training either through alternative delivery channels or revisions to training contracts. Preliminary results were reviewed and the need was identified to conduct a quick delivery cost assessment of which courses to target for cost reduction. In conjunction with SFA University, this quick assessment will be updated based on FY 2000 training data as well as research into the existing gaps of current information. Low-cost solutions that are easy to implement ("quick

Subject: Deliverable 29.3.1c Training Services Summary; September 30, 2001

hits") will be identified. Quick hits will include those courses with low content complexity, high volume of participants, frequent course sessions, low course fulfillment and the need for consistent content for all users. Specific activities in the next development period will include:

- Analysis of the 2000 training data
- Detailed research of the costs of one course and identification of the related process and tools
- Gather baseline data for all other courses

LMS support

During this period, the effort to identify and secure funding for a Learning Management System (LMS) was completed. While the LMS requirements and selection effort was primarily driven through a separate work effort, the impact on SFA and SFA University were addressed through this work effort.

Observations/Recommendations

During the period August 16 – September 30, the following observations were identified and will be reviewed to determine the potential impact/value for SFA University:

- It would be beneficial to capture the services SFA University currently provides in a SFA University "blueprint" similar to the organization-wide blueprint. This will help SFA University communicate its role as a strategic partner within the organization as well as prioritize capability development projects. This effort has been incorporated under SFA University strategic planning and organization development described above.
- SFA University should explore its role as a service provider to the rest of the organization to provide a cohesive resource for the organization to improve its human performance potential. This effort has been incorporated under SFA University strategic planning and organization development described above.
- A strategy for knowledge management for SFA University will help share and integrate processes/information. The SFA University knowledge management strategy should be aligned with, but not subordinate to, an overall SFA knowledge management strategy. This knowledge management strategy should be coordinated with HR, CIO and Analysis.
- The Learning Consultant model should be more fully developed as a service delivery model and may include additional assessment and performance services. The

Subject: Deliverable 29.3.1c Training Services Summary; September 30, 2001

Learning Consultant role may transition into a broader role of performance consulting for the Channels and Enterprise Units. This role and service model will be more fully developed in the next set of deliverables.

Attachments:
- Gantt chart for training development and delivery methodology
- Progress matrix for the creation of training development and delivery methodology tools, templates, job aids and checklists.
- Plan It! templates and job aids for the training development and delivery methodology (rough drafts)
    - Stakeholder Analysis template
    - Stakeholder Analysis job aid
    - Audience/User Analysis template
    - Audience Analysis job aid
    - Gap Analysis template
    - Learning Objectives template
    - Learning Objectives job aid
    - Curriculum Plan template
    - Curriculum Plan job aid
    - Instructional Platform job aid
    - Logistics Summary job aid
    - SFA University Role Map
    - Task Order template
- Design It! templates and job aids for the training development and delivery methodology (rough drafts)
    - Training Writing Standards template
    - Training Material Standards job aid
    - Audio Scripts template
    - Alpha Usability Testing job aid
    - Evaluation Capabilities job aid
    - Surveying job aid
    - Help/Support Process Roles template
    - Help/Support Tracking Log template
    - Communication Plan template
    - Communication plan job aid
- Project Management reporting templates